Hiring Personal Assistants

Goal

- To provide participants with the knowledge and skills needed to evaluate final candidates, make job offers, finalize work agreements, and politely turn down those who are not qualified.

Time

3 hours, 45 minutes plus breaks

Activities	Teaching Methods	Time
5.1 Welcome & Homework Review	Discussion, Large-Group Exercise, Interactive Presentation	30 minutes
5.2 Checking References	Discussion, Pairs Work	45 minutes
5.3 Making an Offer	Interactive Presentation, Pairs Work, Discussion	30 minutes
5.4 Sealing the Deal: Developing Work Agreements	Discussion, Individual Exercise	60 minutes
5.5 Overview of Consumer-Directed Program Requirements	Interactive Presentation	30 minutes
5.6 Closing	Large-Group Exercise, Discussion	30 minutes

Supplies

- Nametags and/or card stock table tents
- Flip chart, easel, markers, tape, name tags or table tent card stock
- Paper and pens or pencils
- Copies of ***Hiring and Managing Personal Assistants***, by Ellen Sugrue Hyman, Esq., if participants did not receive copies during earlier sessions.

Note: An overhead projector with transparencies or LCD projector and computer may be used for some presentations, if desired. If you intend to use a projector, make sure you have the necessary equipment and screen. (Some PowerPoint slides are provided on your CD. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.)

Handouts

- Handout 1: References and What I Can Learn from Them
- Handout 2: Questions I'd Ask a Reference
- Handout 3: Sample Reference Questionnaire
- Handout 4: Tips for Making an Offer
- Handout 5: Actions That Help Avoid Unnecessary Coverage Emergencies
- Handout 6: Consumer/Personal Assistant Work Agreement
- Handout 7: Prototype Employment Agreement
- Handout 8: Opinion Poll 5
- Administrative forms for your consumer-directed program (see Activity 5.5). These forms must be obtained locally. Instructors can contact the county or area agency for copies of the appropriate forms.

Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants' physical needs.

Review the teaching materials for each activity.

Set up the flip chart easel, projector, and other equipment, as necessary, for optimum viewing by all participants. Put out nametags or table tents at each participant's place.

Post prepared-in-advance flip chart page with "**Finding and Hiring Personal Assistants: Goal and Objectives**" where everyone can see it. (If not available from previous sessions, see Activity 5.1, step 3.)

Activity 5.1 Welcome & Homework Review

Prepare a **flip chart** for to log concerns, questions and expectations (step 1).

Prepare a **flip chart** for the parking lot (step 2).

Prepare **a flip chart page** with the day's agenda, as shown in step 5.

Activity 5.2 Checking References

Prepare a **flip chart** for step 2 that has "Who Could Provide a Reference?" on the left half side of the flip chart.

Copy **Handout 1: References and What I Can Learn from Them, Handout 2: Questions I'd Ask a Reference,** and **Handout 3: Sample Reference Questionnaire** for all participants.

Prepare a **flip chart** for step 4, "Questions to Ask References."

Prepare **flip chart pages** concerning pros and cons of written and phone references as shown in step 7.

Activity 5.3 Making an Offer

Copy **Handout 4: Tips for Making an Offer** for all participants.

Prepare a **flip chart** with the "What If" scenarios as shown in step 2.

Practice demonstration role plays with co-facilitator.

Activity 5.4 Sealing the Deal: Developing Work Agreements

Copy **Handout 5: Actions To Help Avoid Unnecessary Coverage Emergencies** and **Handout 6: Consumer/Personal Assistant Work Agreement** for all participants.

Prepare a **flip chart** to log the responses about what to include in a work agreement and why it is important to have one (step 1).

Activity 5.5 Overview of Consumer-Directed Program Requirements

Program requirements differ by geographic area and funding source. Information needs to be gathered locally and, for this activity, given to consumers in writing. The instructor should be very familiar with the local program and prepared to talk briefly about the details with the group. The instructor can also arrange for a guest speaker to present this activity and share program materials.

Copy program-related materials to be handed out, as well as **Handout 7: Prototype Employment Agreement** for all participants.

Activity 5.6 Closing

Prepare a flip chart with the opinion poll shown in step 3.

To use placards for this exercise, if you and participants do not have them from a prior workshops, prepare them in advance. Make three colored placards that say "Strongly Agree" (green), "Strongly Disagree" (red), and "Mixed Opinion" (other color) for each participant.

Copy **Handout 8: Opinion Poll 5** for all participants.

Prepare a **flip chart** page to record evaluation scores as shown in step 7.

Activity 5.1 Welcome & Homework Review

30 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe the workshop goal and objectives and the day's agenda; and

Explain why asking open-ended questions and paraphrasing are essential to the process of interviewing and hiring PAs.

Key Content

- The focus of today's activities is on the formal aspects of hiring a personal assistant.
- Active listening skills, particularly asking open-ended questions and paraphrasing, improve with practice.
- Using these skills during the recruitment and hiring process makes it more likely that the consumer will find a good match.

Activity Steps

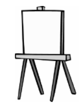
Discussion—5 minutes

1. **Welcome participants** back to the workshop. Ask if anyone has any comments, concerns, or expectations regarding the last session or this one. Write these on the flip chart to ensure they are attended to at the appropriate time.

CONCERNS, QUESTIONS
AND EXPECTATIONS

2. **Remind participants about the parking lot:** Display the "Parking Lot" flip chart and remind everyone that this will be the place to record issues that come up that are important, but can't be addressed at the time they arise because of the schedule and your efforts to cover all the topics in the session .

PARKING LOT



Large-Group Exercise—10 minutes

3. **Conduct introductory activity:** Choose an ice-breaker from *"Introductory, Warm Up & Energizer Activities" guide on your CD* to energize and prepare participants for the day.

   Explain that this workshop is intended to be highly interactive, and that everyone will have a chance to express their thoughts, feelings, and experiences.

Interactive Presentation—5 minutes

4. **Review workshop goal and objectives:** Referring to the prepared-in-advance flip chart page displayed in earlier sessions (also on **Workshop III, Session 3, Handout 1: Goal and Objectives**), review the workshop's overall goal. Then, highlight the focus of today's session: to provide participants with the knowledge and skills needed to evaluate final candidates, make job offers, finalize work agreements, and politely turn down those who are not qualified.

FINDING AND HIRING PERSONAL ASSISTANTS

<u>Goal</u>

After completing the three sessions of this workshop, participants will have the knowledge and

skills they need to begin recruiting and hiring their personal assistance staff.

Objectives

Participants who complete this workshop will be able to:

- Advertise, pre-screen, interview, and hire personal assistants (PAs) who best match and support their needs and preferences.
- Communicate effectively with potential PAs, using active listening skills, including asking open-ended questions and paraphrasing.

5. **Review the day's agenda:** Post the prepared flip chart with the day's agenda. Go over activities and break times. Make sure everyone is comfortable with the space and the room temperature.

TODAY'S AGENDA (SAMPLE)

5.1 Welcome & Homework	11:00 a.m.
5.2 Checking References	11:30
5.3 Making an Offer	12:15 p.m.
Break	12:45
5.4 Sealing the Deal: Developing Work Agreements	1:00
5.5 Overview of Consumer-Directed Program Requirements	2:00
5.6 Closing	2:30
Adjourn	3:00

Discussion—10 minutes

6. **Review homework assignment:** Remind participants about the homework assignment that they were given in **Workshop III, Session 4**, and ask them:

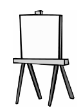
   What questions did you ask your "candidate"?

   What questions were most successful in getting you the information that could help you decide if the candidate was a good match?

   Was there information you were trying to get but couldn't? Why?

   Write answers for the last two questions on a flip chart that is divided into two columns: "Successful Questions" on the left and "Difficult Info to Get," on the right.

INTERVIEWING MY CANDIDATES	
Successful Questions	Difficult Info to Get



7. **Facilitate discussion regarding how to get difficult information:** Ask if anyone has suggestions for questions that might help participants solicit some of the information that was difficult to get.

8. **Wrap up discussion:** Wrap up by praising everyone for taking the time to practice and helping each other become better interviewers. Note that the rest of this session will focus on the next step in the process of putting together a staff: hiring.

9. **Thank everyone** for coming to the workshop and for participating in the discussion.

Activity 5.2 Checking References

45 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Explain why it is always important to check references before hiring a candidate;

Explain the pros and cons of asking for written references vs. telephone references;

Identify the kinds of people who should be asked for references; and

Articulate three questions that are essential to ask any reference.

Key Content

- Interviews are one way to find out about a candidate's skills, personality, and job history. A second way is to ask for references.

- References are a good way to make sure your impressions of a candidate align with the experiences of others who have worked with the candidate.

- References from previous employers, particularly if the candidate worked as a PA, can provide a great point of view on a candidate's reliability as a worker. For applicants without formal work experience, find someone who knows the person well through an activity that requires commitment and follow through: for example, a teacher or professor, others with whom the person has worked on volunteer or community activities, or a minister or other religious leader.

- When asking questions of a reference, open-ended questions are likely to solicit more useful information.

Activity Steps

Discussion—20 minutes

1. **Begin discussion about references:** Explore whether participants have ever been asked for a reference or solicited a reference from someone. Ask participants:

   What does your experience tell you about why you might want to ask for references when hiring a PA?

   In this discussion, highlight responses such as these: making sure that others think well of the candidate, seeing if others can tell me if the candidate has the qualities I'm looking for, ascertaining if what the reference thinks of the candidate is the same or similar to my impression.

2. **Discuss from whom a consumer can obtain references:** Explain to participants that you would like to remind them of the rules of brainstorming before the next activity (see **Workshop I, Session I, Handout 5, page 2: Brainstorming).** Distribute **Handout 1: References and What I Can Learn from Them** and invite participants to take notes if they would like. Then ask:

   From what kinds of people might it be good to solicit references?

   Look for responses such as: a former employer, a teacher, a friend, a coach, a member of the clergy, etc. Write responses on a flip chart, down the left-hand column.

WHO COULD PROVIDE A REFERENCE?

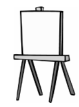
   

   Once you have a number of sources listed, ask:

What might the reference know about the candidate that the consumer would like to know?

Write responses on the flip chart, down the right-hand column.

WHO COULD PROVIDE A REFERENCE?	WHAT INFO CAN THEY SHARE?



Pairs Work and Reports—15 minutes

3. **Explain and conduct pair activity:** Divide participants into pairs, or let them turn to the person next to them. Ask them to think of two open-ended questions that they would want to ask a reference. Hand out and invite them to use **Handout 2: Questions I'd Ask a Reference** if they would like. Give them about 5 minutes. Circulate and assist them as needed, and give participants a one-minute warning when time is running out.

4. **Conduct the report out:** Bring the group back together and ask one pair to tell the group one of their questions. Write the question on a **flip chart**.

QUESTIONS TO ASK REFERENCES

Ask what the question will tell the consumer about the candidate. Go around asking other pairs to volunteer one of their questions, following the same process until all the pairs have been asked. As time allows, go around again and ask for the second questions from each pair.

If any of the questions are not open-ended, ask the group if they can reword them to make them open-ended.

5. **Distribute Handout 3: Sample Reference Questionnaire** for participants' resource binders. Highlight any questions that have come up in discussion, and close by noting the last question, "Is there anything I haven't asked that you would like to share with me?" Discuss how useful this question can be in any interview.

Discussion—10 minutes

6. **Discuss how to obtain references from candidates:** In the large group, discuss participants' preferences. Would they like applicants to bring their letters of reference to the interview? Or would they prefer to request that candidates give them the names and contact information for references so they can call references themselves after they have decided that they believe the candidate is right for the job? Suggest that they should always ask for three references, including one that is work-related.

7. **Pros and cons of asking for references from all candidates:** Using a prepared-in-advance flip chart page to record their answers, ask participants to identify the pros and cons of having candidates bring written letters of reference to the interview. Then, ask for pros and cons of asking candidates you like for references you can call *after* the interview.

ASK CANDIDATES TO…

BRING LETTERS OF REFERENCE TO INTERVIEWS

Pros	Cons

GIVE REFERENCE INFO TO YOU SO YOU CAN CALL AFTER INTERVIEWS

Pros	Cons

8. **Wrap up discussion:** Ask participants if they have any additional questions about soliciting references.

9. **Thank everyone** for their active participation in the discussion.

Activity 5.3 Making an Offer 30 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Explain why it is important to follow up with all candidates who interviewed for the job;

Explain that when making a hire, it is best to list potential candidates in order of preference and call them in that order;

Politely turn down candidates who don't meet their needs; and

Identify ways to use suitable candidates for back-up or emergency support or assistance.

Key Content

- After interviewing all candidates and checking references, the next step is making an offer to one or more of the candidates.
- When preparing to make an offer, the first step is to list candidates in order of preference. It is wise to offer the position to the person at the top of the list first and wait for his or her response before contacting others. A consumer may even want to wait until an offer has been accepted and a work agreement signed before rejecting others. If the first choice doesn't work out, then, the consumer can continue down the list until someone agrees to take the position.
- If there are more good candidates than a consumer needs to fill regular shifts, other good candidates can be asked to work as back-up staff and kept in mind for future positions.
- It is considerate and helpful in the long run to follow-up, either by phone or mail, with all candidates who were considered for the position. This may affect a consumer's reputation in the personal assistance community and lay positive ground work for calling people back in the future.

Activity Steps

Interactive Presentation—10 minutes

1. **Explore the process of making offers:** Explain that after completing the process of interviewing candidates and checking references, the next step is to make an offer. Reinforce that it is best to list candidates in the order of preference and call the person on the top of the list first. Ask:

   How would you decide the order of preference? What factors would you consider?

   Discuss and ensure that the discussion includes checking candidates against a consumer's "must haves" and "preferences."

2. **Conduct a "What If" discussion:** Display a prepared-in-advance flip chart, showing the following "what if…" scenarios, and facilitate a discussion about each.

"WHAT IF…" SCENARIOS

What if the person on the top of the list doesn't respond to you in a timely manner?

What if the person you offer the job to says they can't start working any time soon?

What if the person on the phone sounds drunk or otherwise different from the person you interviewed?

❖ **Teaching Tips**

In the first scenario, have participants define their idea of "timely" in this situation.

In the second scenario, have participants define what "any time soon" means to them. To follow up, ask: *How long would you wait to hire an ideal candidate? Would you hire someone just to cover for a short period of time?*

In the third scenario, raise the question, *What if this person has low blood sugar, or some other medical condition that is the reason she or he sounded the way she or he did?*

3. **Discuss the importance of follow up with *all* candidates:** Explain that it is important to follow up with all candidates who were considered for a position, even those who were not "the best." Ask participants why they should follow up. Responses to look for might reflect the following: Some of these candidates might be willing to provide back-up support or take future positions. Candidates may talk badly about you to others and that may hurt future recruiting efforts.

   Note that it's a good idea for a consumer to meet with the candidate who accepted the offer and complete a work agreement (Activity 5.4) prior to notifying other candidates that they did not get the job. Explore the reasons for this with the participants and discuss their opinions.

Pairs Work —15 minutes

4. **Explain and conduct pair discussion:** Ask everyone to turn to the person next to them and to talk in pairs for a moment about whether they would choose to reject candidates by letter or telephone.

5. **Debrief the discussion:** Bring the group back together and ask: *What are the advantages and disadvantages of each method?* Discuss the responses. Emphasize that, regardless of how it is done, it is good to contact all candidates who applied, and it is particularly important to personally contact anyone who might make a good back-up person or future PA.

6. **Discuss the difficulty with rejecting candidates:** Note that rejecting candidates can be difficult. Ask participants to take a moment to imagine themselves being turned down for something that was important to them. Ask:

How would you react to being rejected? What feelings might come up? What would make this less painful?

7. **Present sample role plays:** With a co-facilitator or a volunteer participant, role-play a tense rejection conversation, in which the consumer is awkward and rushed and seems unintentionally rude. Discuss the impact of this interaction on the consumer and candidate.

   Next conduct a positive rejection conversation, in which the consumer is pleasant, clear, and firm. Discuss the impact of this rejection on the consumer and candidate. Ask for the qualities of a "positive" rejection. If participants appear very engaged in this discussion, record responses on a flip chart.

8. **Set up and conduct participants' pair role plays:** Explain that, because it is difficult to personally call someone and reject them for a position, the group will practice. Ask the participants to quickly form pairs and decide who is "A" and who is "B." Ask the "A" participants to play the role of the consumers rejecting the "B" participants who will play the candidates. Encourage them to make the rejection as clear, firm, and kind as possible. Give them a minute or two to do the role play. Then, ask the pairs to switch roles. Instruct the "B" participants to reject the "A" candidates now, as kindly, clearly and firmly as they can. Again, give them a minute or so to conduct their role plays.

Discussion—5 minutes

9. **Debrief the role plays:** In a large group, ask people to recall how they thought and felt about the consumer's handling of the situation when they were "candidates." Then ask everyone how it felt in the moment when they were the "consumers." Ask and discuss the following:

   How did consumers explain why the candidates weren't getting the job?

   Did the consumers ask the candidate about their availability for back-up or future positions?

   Did this make it easier to say "no"?

10. **Wrap up the discussion:** Distribute and quickly review **Handout 4: Tips for Making an Offer.** Emphasize that contacting people personally allows consumers to keep expanding the pool of potential PAs. Next time they are looking, they may want to send a mailing or call candidates who applied this time.

Activity 5.4 Sealing the Deal: Developing Work Agreements

60 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Explain what belongs in a work agreement;

Communicate to a candidate or newly hired PA his or her job responsibilities and the consumer's expectations of the relationship; and

Draft a work agreement for a current or future PA position.

Key Content

- A work agreement, along with a job description, is a good way for consumers to communicate their needs and preferences to PA candidates who are in the final stages of considering and accepting a job offer.
- Many consumers find that job descriptions and work agreements are helpful in both hiring and working with PAs. Studies have also shown that workers often prefer to have a written description of their work duties. In addition to clarifying expectations in the final stages of hiring, the work agreement can also help to minimize disagreements later on.
- Specifically, job descriptions and work agreements can be used:
  - To help the consumer get a realistic picture of his or her assistance needs, limitations, and lifestyle.
  - To give a prospective employee a clear idea of what the position requires.
  - To provide a checklist of duties and responsibilities for the position.
  - To serve as a tool with which to evaluate the PA's performance on the job.
  - To remind the consumer-employer about the original agreement, so that he or she doesn't take advantage of the PA.

- To clarify disputes between the consumer and the worker as to what the worker's duties are.
- To help keep communication open in the consumer/PA relationship.
- To establish the position as a "real" job, with standards and recognition, and not just someone "helping out."

Note: *The above list is adapted from one by the Community Living Alliance of Madison, Wisconsin.*

Activity Steps

Discussion—15 minutes

1. **Introduce work agreements:** Explain that you will now be discussing work agreements, the documents that guide consumers and candidates in their last discussions about the details of the job. Ask participants, *What else might you want to include in a work agreement that isn't in the job description?"* Write responses on a prepared-in-advance flip chart.

WORK AGREEMENTS

What to Include

   Be sure that the final list includes: this employee's specific schedule, rules about calling when he or she can't come in, and the consumer's other "house rules." It will also have a formal commitment from the candidate regarding wages, probation period, etc. Emphasize that covering all these points is a reason to have a work agreement in addition to a job description.

2. **Discuss handling emergencies:** Distribute copies of **Handout 5: Actions To Help Avoid Unnecessary Coverage Emergencies.** Suggest that now is a good time to check through the list and think what, if anything, consumers would also want to include in a work agreement based on this handout. Discuss issues participants raise.

3. **Review sample work agreement:** Distribute copies of **Handout 6: Consumer/Personal Assistant Work Agreement.** Review the main categories covered by the work agreement—e.g., work hours, tasks, wages, and expectations for the consumer/PA relationship. Discuss any issues that participants raise during the review. Explain that work agreements cover the specific information consumers need to clarify the arrangements they are making with specific PAs. The work agreement supplements a job description, which can be referenced in the task list if the job description describes all that the consumer wants done.

   Also, refer everyone to the more extensive agreement in ***Hiring and Managing Personal Assistants.*** Give copies to all participants if they haven't already been handed out.

4. **Check on probation periods:** Ask participants, *When you hire someone, do you want to have a "trial period" of some sort before finalizing his or her permanent status with you*? Invite stories that illustrate how this might work. Discuss.

Individual Exercise—30 minutes

5. **Introduce and conduct individual work activity:** Ask participants to develop a work agreement for their primary PA position using **Handout 6: Consumer/Personal Assistant Work Agreement**. The agreement will be based on their personal papers, including:
   - **"Snapshot of Me**" (Workshop III, Session 3, Handout 6)
   - **"My Personal Assistant Job Description** (Workshop III, Session 4, Handout 5)
   - **"My Staffing Plan and Personal Assistant Schedule"** (Workshop III, Session 4, Handout 7)

   Remind them to refer to their PA Schedule and see if they think different work agreements will be necessary for different positions. Invite participants to work in pairs, if they would prefer, but to be sure to allow 15 minutes for each person's work agreement.

Discussion—15 minutes

6. **Facilitate large-group discussion:** Bring participants back together, and ask:

   What was most important for you to have in your work agreement?

   Did you find the process of developing the agreement helpful? In what way?

   How do you think you will use your work agreement?

7. **Thank participants** for their contributions to the discussion and their thoughtful work on their own agreements.

Activity 5.5 Overview of Consumer-Directed Program Requirements

30 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Explain basic program requirements, including:

- *Application procedures*
- *Determination of approved hours*
- *Hour requirements and restrictions for PAs*
- *Wages and benefits*
- *Process for terminating employment*

Key Content

- Consumers are responsible for:
  - knowing information about program and administrative requirements,
  - communicating requirements to their current and future workers, as necessary, and
  - fulfilling reporting requirements.
- This is not intended to be an in-depth session where all the consumers' questions are answered. It is designed to provide a summary review of what is required as an employer. As consumers work with their local agencies and funders, they will receive a more detailed orientation.

Activity Steps

Interactive Presentation—30 minutes

❖ **Teaching Tip**

You may want to invite a guest speaker from the administering agency used by the consumers participating in the session to present this section. Share the overview in step one below with him or her in advance of the session.

1. **Provide a brief overview** of program requirements and distribute administrative forms. As you proceed, give participants a chance to ask questions. Discuss:

   - Program application forms
   - Overview of Medicaid information
   - Any specific regulations defining what personal assistants (PAs) are allowed or not allowed to do with regard to providing care
   - Wages and any benefits to be paid to PAs (including health insurance and sick, vacation, and holiday pay, if any)
   - Requirements or restrictions on the number of hours PAs are allowed to work (e.g., not more than 40 hours per week, etc.)
   - Information required prior to hiring (e.g., specific forms, Social Security numbers, citizenship verification, criminal background checks, physicals, etc.)
   - Payroll administration procedures (how timesheets are to be filled out, when they must be submitted, who gets checks, when, etc.)
   - Information about any oversight requirements (e.g., some states require that an RN visit twice per year to assess whether the consumer's needs are being met satisfactorily)
   - Who to contact about payroll problems, problems signing up new PAs, etc.
   - Any requirements or funding available (or other resources) for PA training

- The process for terminating employment of PAs
- The "Agency with Choice" and other options available to them if they do not wish to assume all employment administrative responsibilities
- Any other relevant information required to implement the program

2. **Review prototype employment agreement:** As appropriate, review **Handout 7: Prototype Employment Agreement** with participants. Explain that this is a much more detailed and legalistic agreement than is suggested in the **Hiring and Managing Personal Assistants** guide book, but may not be necessary for many consumers, for whom the shorter agreement will be sufficient.

3. **Outline additional support that is available:** Remind participants that when they are formally accepted into the consumer-directed program, they will likely be required to meet for a one-on-one session with a case worker or counselor to review all of this information.

4. **Thank participants** for their attentiveness to the presentation and their good questions.

Activity 5.6 Closing **30 minutes**

Learning Outcomes

By the end of this activity, participants will be able to:

Identify at least one thing they learned in this session that they will use when they begin interviewing and hiring.

Key Content

- Providing closure to the day is an essential part of learning. This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group.

- The end-of-day wrap-up also allows participants to share what they learned and reflect on how the workshop has affected their lives. Finally, it gives participants the chance to do an informal evaluation for the instructor about which parts of the workshop were most useful and which could be improved.

Activity Steps

Large-group discussion and exercise—30 minutes

1. **Check on learning from the workshop:** Explain that this is the end of **Workshop III: Hiring Personal Assistants**, and so it is a time to reflect on what participants have learned and how that learning can be applied to their personal situations. Review the prepared-in-advance flip chart with the **Workshop III Goals and Objectives** and explain that this is what you hope has been accomplished. Ask participants the following questions and discuss:

   What is the most important thing you learned in this workshop?

   How do you think you can apply what you learned to your own situation?

2. **Explain the opinion poll activity:** Distribute opinion placards to all participants. Explain:

   We are going to do an opinion poll so we can all get a better sense of how prepared you feel to be consumer employers.

   I will read a statement. Please think about whether you agree with this statement, disagree, or are of mixed opinion. There is no right or wrong answer, and you are entitled to your own opinion. The purpose of the exercise is to consider how you feel and to hear what others feel.

   After you hear the statement, please raise the placard that matches your opinion, and then we'll hear from people in each group about why they feel that way.

   - **Teaching Tip**
     If space allows participants to move to three corners of the room, and they are physically able, you can have participants move to one of three parts of the room to express their opinions. Post one of the colored placards on each wall to indicate where you want participants to go.

3. **Display the opinion poll:** Distribute **Handout 8: Opinion Poll 5.** Then using the prepared-in-advance flip chart, read the opinion poll statement aloud:

I FEEL READY TO BEGIN FINDING, SCREENING AND HIRING PAS. PLUS, I KNOW THAT MY SKILLS AND KNOWLEDGE WILL EXPAND OVER TIME WITH PRACTICE AND EXPERIENCE.

4. **Ask for opinions:** Ask participants to raise the placard or go the location that best represents how they feel about the statement.

5. **Facilitate dialogue.** Encourage everyone in each group to explain his or her opinion, while highlighting that all points of view have value. Ask the following questions to get the discussion started:

   Why do you have the opinion you do? Can you explain?

   Encourage participants to understand that the workshops are only the beginning of what they will learn over time, and that it is your hope that they will keep learning from experience, and by talking with and learning from other consumers and organizational staff. Explain any additional supports that will be offered to them, and invite them to discuss how they can support each other.

6. **Collect the opinion poll placards.** Ask participants to please turn these in so you can have them available for other classes.

7. **Conduct a quick evaluation:** Ask participants, "How much of today was a good use of your time?" Invite them to vote for one of the percentages you have listed on a prepared flip chart as shown below.

   After they've voted and you've recorded their responses (praising those who gave lower rankings for their honesty), ask them to tell you what worked really well for them—the highlights—and what they think could be better—the "low-lights." Record ALL answers on the flip chart. Ask clarifying questions to be sure you understand the points being made.

SESSION EVALUATION

___ 25% ■ ___ 50% ■ ___ 75% ■ ___ 90%

Highlights	Things to Improve

8. **Thank participants who gave specific feedback, both positive and critical**, and emphasize that it will help you improve future sessions.

9. **Thank everyone and highlight future sessions:** Explain your future plans. If you are offering the whole series, explain that the last two sessions, included in Workshop IV, will focus on supervisory skills. Remind those who plan to take the next workshop to bring their binders and materials to the sessions. Give date and location of next workshop.

10. **Send participants off with good wishes:** Say good-bye and wish participants well in their efforts to apply the skills and understandings they've gained at the session. Remind them that their skills will improve with practice!

11. **Adjourn:** A fun way to draw the session to a close is to call for a motion to adjourn and invite all who agree to say, "Aye!"

12. **Celebrate**, as appropriate.